

	<b>Montana Mental Health Nursing Care Center Policy Manual</b>	<b>Policy Number</b>	<b>1422</b>
		<b>Original Date</b>	<b>05/16/1983</b>
		<b>Revised Date</b>	<b>10/08/2015</b>
	<b>Department: Medical Records</b> <b>Auditing and Purging of Medical Records</b>		

### **POLICY:**

Medical records will be purged quarterly.

### **PROCEDURE:**

1. The Medical Records will remove excess material from the chart using the following guideline:
  - A. Remove any physician orders over 2 years old.
  - B. Remove any physical over 2 years old.
  - C. Remove any lab work, pathology reports, and EKG's over 2 years old.
  - D. Remove any x-rays over 2 years old.
  - E. Retain 3 MARS; the current one and 2 previous ones.
  - F. Retain drug profile and immunization record permanently.
  - G. Retain 3 months of interdisciplinary notes to include last quarterly review.
  - H. Retain current blood pressure form and the previous one. Retain current weight chart.
  - I. Keep Psychiatrist notes, Psychologist notes 1 year keep specialists consults 2 years, and Podiatry notes 1 year.
  - J. Keep operative reports for 5 years.
  - K. Keep discharge summaries permanently.
  - L. Remove any nursing ADL sheets over 3 months old leaving current month and previous month.
  - M. MDS COORDINATORS will purge the MDS section. (15 months)
  - N. Keep 2 most recent AIMS assessments.
  - O. Keep Physician progress notes 3 years.
  - P. Keep recent dietary assessment and 1 year dietary progress notes.
  - Q. Keep Rehab notes 2 years.
  - R. Keep social history and social assessment permanently.
  - S. Keep recreation assessment 1 year and participation records for 3 months.
  - T. Keep the 2 most recent Braden scales and pain assessments.
  - U. Keep the most recent restraint and authorization form.
  - V. Keep 7-day Observation 3 months.
2. All material taken from the chart will be filed in the permanent retention file.
3. Specific material may remain in the chart when requested by physicians, regardless of the above guide lines.
4. The above guidelines may at times require adjustment according to resident needs. The materials thinned will be placed in the permanent retention file.